DEMAND

PROJECT DELIVERY

FACILITIES IN USE

Needs of the Overall Enterprise

Performance Requirements

Project Programming

Statement of Requirements

Property Management, Operation and Maintenance

Portfolio and Asset Management

Asset Mngmt Plans

Gap Analysis

Decisions

Macro Performance Requirements

Approved Business Plan

Initiate a Project

Solicit Offers for Rental or Purchase	Select Integrated Team	Select Design Team
Design Program	**Design Program**	**Design Program**
Interior Architecture	Integrated Design	Design by A&E
Gap Analysis	**Gap Analysis**	**Gap Analysis**
Build-out	Construct	Construct

Acquire a Facility

Commissioning and **Gap Analysis**

Operate and Maintain, and Routine Repairs

Gap Analysis

Repair and Alterations

Use by the Overall Enterprise

Diagram by Françoise Szigeti and Gerald Davis. © 2000, 2002, International Centre for Facilities

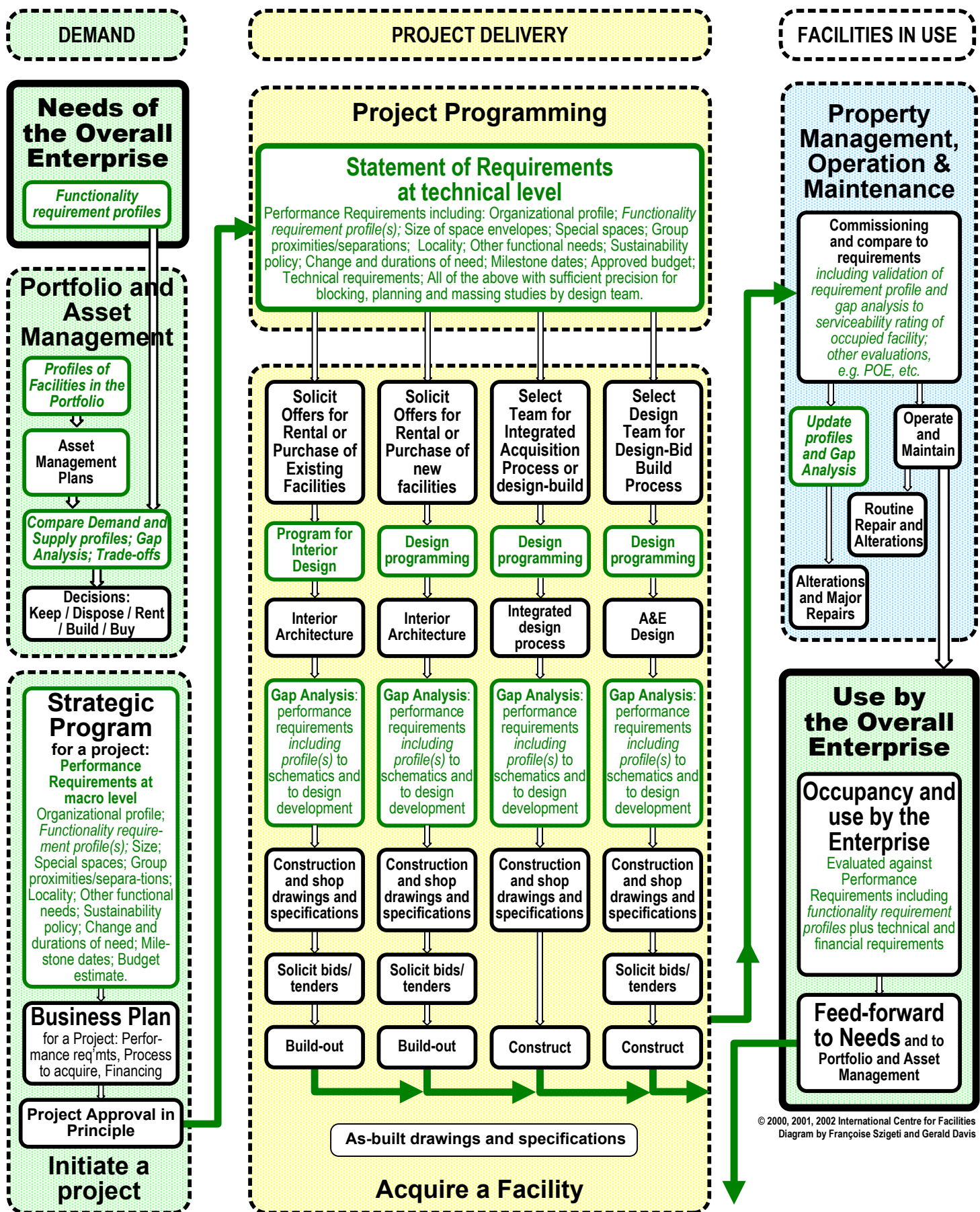**Feed Forward to Needs and to Portfolio and Asset Management**

Knowing what is required, and measuring the functionality of what is provided

ST&M is intended for the left (demand) column, (a) for managing a portfolio or inventory of properties, (b) for determining the key points about functional requirements, before a project is approved, and (c) serviceability ratings, compare, and gap analysis. Thereafter, it provides a tool for rating the serviceability of what is programmed, proposed, or provided, and comparing against what is required, and against other norms.

In Project Delivery, serviceability (functional capability) of the existing facilities on offer, or of the concept design should be rated (measured) for compliance with requirements for functionality. Then, any deficiencies can be identified and resolved before further investment.
A second rating is recommended at end of design development, since this is often when a technical team takes over from a design team.

If it becomes necessary to cut costs from the design, a serviceability rating of the design will indicate where there is surplus serviceability, where there may already be shortfalls of serviceability, and where there are minimum threshold levels of serviceability that must be maintained.

In these diagrams, the boxes with a green border refer to requirements of the occupants and owner. The heavy green lines with arrowheads refer to information flows. Text in italics refers to use of profiles of functionality and serviceability.

Edit date 2002-06-24   PBBco-3 processlarge   p=02-06-24

DEMAND

PROJECT DELIVERY

FACILITIES IN USE

Needs of the Overall Enterprise

Functionality requirement profiles

Portfolio and Asset Management

Profiles of Facilities in the Portfolio

Asset Management Plans

Compare Demand and Supply profiles; Gap Analysis; Trade-offs

Decisions: Keep / Dispose / Rent / Build / Buy

Strategic Program

for a project:
Performance Requirements at macro level
Organizational profile; *Functionality require-ment profile(s);* Size; Special spaces; Group proximities/separa-tions; Locality; Other functional needs; Sustainability policy; Change and durations of need; Mile-stone dates; Budget estimate.

Business Plan
for a Project: Perfor-mance req'mts, Process to acquire, Financing

Project Approval in Principle

Initiate a project

Project Programming

Statement of Requirements at technical level
Performance Requirements including: Organizational profile; *Functionality requirement profile(s);* Size of space envelopes; Special spaces; Group proximities/separations; Locality; Other functional needs; Sustainability policy; Change and durations of need; Milestone dates; Approved budget; Technical requirements; All of the above with sufficient precision for blocking, planning and massing studies by design team.

Solicit Offers for Rental or Purchase of Existing Facilities	Solicit Offers for Rental or Purchase of new facilities	Select Team for Integrated Acquisition Process or design-build	Select Design Team for Design-Bid Build Process
Program for Interior Design	**Design programming**	**Design programming**	**Design programming**
Interior Architecture	Interior Architecture	Integrated design process	A&E Design
Gap Analysis: performance requirements *including profile(s) to schematics and to design development*	**Gap Analysis**: performance requirements *including profile(s) to schematics and to design development*	**Gap Analysis**: performance requirements *including profile(s) to schematics and to design development*	**Gap Analysis**: performance requirements *including profile(s) to schematics and to design development*
Construction and shop drawings and specifications	Construction and shop drawings and specifications	Construction and shop drawings and specifications	Construction and shop drawings and specifications
Solicit bids/ tenders	Solicit bids/ tenders		Solicit bids/ tenders
Build-out	Build-out	Construct	Construct

As-built drawings and specifications

Acquire a Facility

Property Management, Operation & Maintenance

Commissioning and compare to requirements
including validation of requirement profile and gap analysis to serviceability rating of occupied facility; other evaluations, e.g. POE, etc.

Update profiles and Gap Analysis

Operate and Maintain

Routine Repair and Alterations

Alterations and Major Repairs

Use by the Overall Enterprise

Occupancy and use by the Enterprise
Evaluated against Performance Requirements including *functionality requirement profiles* plus technical and financial requirements

Feed-forward to Needs and to Portfolio and Asset Management

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Edit date 2002-06-24
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